Regional Performance Series

Northeast

FY 2025 Performance and Merchandising Review

Potatoes are a reliable, year-round produce department powerhouse, purchased by 85% of U.S. households. By retail volume, potatoes are the second-largest commodity in total produce and the top vegetable overall. Deflationary conditions in fiscal year 2025 have driven pound growth and renewed engagement with larger bag sizes. Growers and retailers can find shared success by leveraging potatoes' broad household penetration to drive growth. **If half of all current potato-buying households made just one additional purchase per year, this could result in an incremental 240 million pounds sold nationwide.**

The regional report series examines performance and sales in each of the eight Circana regions to help understand trends in engagement, varieties, organic growth, and more. The timeframe of this report spans a fiscal year (FY) from July 2024 to June 2025.

Top findings — Northeast

- The Northeast is among the most significant regions for food overall and potatoes, specifically, at 15.9%.
- Volume sales reached their second-highest point in the last six years.
- Deflation affected dollar sales, especially for Russet potatoes.
- White potatoes have an above-average share in the Northeast, but lost some ground to yellow potatoes.
- Both smaller and larger pack sizes grew, while five-pound bags remain the largest seller.

Northeast Unit Shares

The Northeast is one of the largest regions for total food and beverage sales. The region has a very even engagement with center store and perishables. Likewise, the potato share of the unit is right on track with the region's share of total food.

- 15.9% of total food and beverages
- 16.6% of total fresh departments
- 16.1% of total fresh produce
- 16.2% of total fresh vegetables
- 15.9% of total fresh potatoes

Source: Circana, Integrated Fresh, Northeast region as a share of total U.S., MULO+, 52 w.e. 7/13/2025 (FY 2025)
Units remove the impact of different inflation levels across categories and are the best measure for comparison across departments.

FY 2025 Sales Performance

The Northeast had below-average gains in dollars, units, and pounds for total vegetables when compared to the total U.S. However, the region's performance in fresh potato sales was in line with the rest of the country, reflecting unit and volume through, but deflation pulling dollar sales below year-ago levels.

Total U.S. vs. Northeast	$ Sales	$ vs. YA	Unit sales	Units vs. YA	Volume sales	Pounds vs. YA
U.S. vegetables	$45.3B	+0.6%	18.6B	+1.1%	22.5B	+1.6%
Northeast vegetables	$7.9B	-0.6%	3.0B	+0.8%	3.7B	+0.8%
U.S. potatoes	$4.3B	-3.2%	1.2B	+2.3%	4.8B	+2.1%
Northeast potatoes	$699M	-3.4%	189M	+2.6%	732M	+2.3%

Source: Circana, Integrated Fresh, Total U.S. and Northeast region, MULO+, 52 w.e. 7/13/2025 (FY 2025)

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Five-Year Potato Performance Review

Fiscal year 2025 was the best in the past five years in volume sales. Unlike the total U.S., potato volume sales in the Northeast were the second highest on record, at 732 million pounds. Regional dollar sales peaked in 2023 due to higher inflation levels.

Total U.S. vs. Northeast	Volume Sales Total U.S.	Volume Sales Northeast	$ Sales Total U.S.	$ Sales Northeast
FY 2021	4.74B	752M	$3.62B	$664M
FY 2022	4.61B	714M	$3.81B	$661M
FY 2023	4.54B	700M	$4.48B	$728M
FY 2024	4.67B	713M	$4.44B	$724M
FY 2025	4.78B	732M	$4.29B	$700M

Source: Circana, Integrated Fresh, Fresh potatoes, Total U.S. and Northeast region, MULO+, 2019-2025 (FY 2025)

Five-Year Potato Pricing Review

Potatoes reached a five-year high in price per volume and price per unit in 2023, both nationwide and in the Northeast. This prompted slight pressure on volume sales. Prices fell below 2023 levels in fiscal year 2025, which negatively affected dollar sales but boosted unit and volume sales, both regionally and nationally. Prices in the Northeast are higher than the national average.

Total U.S. vs. Northeast	Price per volume Total U.S.	Price per volume Northeast	Price per unit Total U.S.	Price per unit Northeast
FY 2021	$0.76	$0.88	$3.15	$3.48
FY 2022	$0.83	$0.93	$3.37	$3.63
FY 2023	$0.99	$1.04	$3.98	$4.04
FY 2024	$0.95	$1.02	$3.84	$3.95
FY 2025	$0.90	$0.96	$3.62	$3.71

Source: Circana, Integrated Fresh, Fresh potatoes, Total U.S. and Northeast region, MULO+, 2019-2025 (FY 2025)

Price Review by Variety

Among the top sellers, Russet potatoes experienced the most significant decline in the average price per pound in the Northeast, at a rate of -11.7%. Given Russet's dominant share of sales, this affected the entire category. Prices were also down for yellow, white, and white creamers.

FY 2025	Price per volume Total U.S.	% change vs. YA	Price per volume Northeast	% change vs. YA
Total potatoes	**$0.90**	**-5.0%**	**$0.96**	**-5.6%**
Russet	$0.68	-11.0%	$0.73	-11.7%
Yellow	$1.21	+1.2%	$1.16	-1.2%
Red	$1.23	+3.6%	$1.20	-0.1%
All other	$1.90	+3.4%	$1.82	+1.5%
White	$0.80	-7.5%	$0.71	-5.1%
Fingerling	$2.60	-0.5%	$2.56	+0.9%
Red creamer	$2.05	+0.1%	$2.13	-0.7%
Long white	$1.24	-0.7%	$1.19	-0.1%
White creamer	$2.93	+2.5%	$2.01	-10.8%
Purple	$2.89	+1.3%	$2.82	-0.6%

Source: Circana, Integrated Fresh, Fresh potatoes, Total U.S. and Northeast region, MULO+, 2019-2025 (FY 2025)

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FY 2025 Volume Performance by Variety

Pound performances varied widely by type. Russet potatoes increased volume sales by 6.0%, and several other varieties also showed volume growth. These include yellow, long white, and purple potatoes.

FY 2025	Volume Sales Total U.S.	Volume share	Lbs Sales % vs. YA.	Volume Sales Northeast	Volume share	Volume sales % vs. YA
Total potatoes	**4.8B**	**100.0%**	**+2.1%**	**732M**	**100.0%**	**+2.3%**
Russet	3.0B	62.3%	+3.6%	378M	51.7%	+6.0%
Yellow	932M	19.5%	+6.2%	162M	22.2%	+3.5%
Red	501M	10.5%	-10.1%	85M	11.6%	-9.2%
All other	178M	3.7%	+4.5%	42M	5.7%	+9.7%
White	170M	3.6%	-4.6%	57M	7.8%	-8.1%
Fingerling	10M	0.2%	+4.0%	1.9M	0.3%	-12.0%
Red creamer	9.0M	0.2%	-5.8%	4.4M	0.6%	-7.2%
Long white	2.2M	0.0%	+8.1%	1.3M	0.2%	+10.4%
White creamer	0.8M	0.0%	-16.6%	0.2M	0.0%	-35.5%
Purple	0.6M	0.0%	-8.7%	0.3M	0.0%	+11.1%

Source: Circana, Integrated Fresh, Fresh potatoes, Total U.S. and Northeast region, MULO+, 52 w.e. 7/13/2025 (FY 2025)

FY 2025 Dollar Performance by Variety

Russet potatoes pulled down the average dollar performance for the Northeast due to deflation, and red potatoes also factored into the overall negative dollar performance. Yellow potatoes performed the best among the larger sellers.

FY 2025	$ Sales Total U.S.	Dollar share	$ Sales % vs. YA.	$ Sales Northeast	Dollar share	$ Sales % vs. YA
Total potatoes	**$4.3B**	**100.0%**	**-3.0%**	**$699M**	**100.0%**	**-3.4%**
Russet	$2.0B	47.1%	-7.8%	$276M	39.4%	-6.4%
Yellow	$1.1B	26.2%	+7.4%	$189M	27.0%	+2.3%
Red	$619M	14.4%	-6.8%	$102M	14.5%	-9.3%
All other	$338M	7.9%	+8.0%	$76M	10.8%	+11.3%
White	$136M	3.2%	-11.7%	$40M	5.8%	-12.8%
Fingerling	$27M	0.6%	+3.5%	$5.0M	0.7%	-11.2%
Red creamer	$18M	0.4%	-5.7%	$9.3M	1.3%	-7.9%
Long white	$2.7M	0.1%	+7.3%	$1.5M	0.2%	+10.2%
White creamer	$2.4M	0.1%	-14.5%	$0.4M	0.1%	-42.5%
Purple	$1.7M	0.0%	-7.5%	$0.8M	0.1%	+10.4%

Source: Circana, Integrated Fresh, Fresh potatoes, Total U.S. and Northeast region, MULO+, 52 w.e. 7/13/2025 (FY 2025)

FY 2025 Organic Sales Performance

The Northeast represented 14.4% of the total organic potato market in the U.S. in fiscal year 2025, slightly below its 15.9% share of total potatoes. Organic was a growth area for the Northeast. The region saw growth in organic potato sales in terms of dollars, units, and pounds, despite a 4.2% year-over-year decline in prices.

Organic	$ Sales	$ vs. YA	Volume sales	Pounds vs. YA	Price per pound	Price vs. YA
U.S.	$215.8M	+3.5%	125.4M	-1.2%	$1.72	+4.8%
Northeast	$31.0M	+3.8%	16.0M	+8.3%	$1.93	-4.2%

Source: Circana, Integrated Fresh, Total U.S. and Northeast region, MULO+, Organic potatoes,52 w.e. 7/13/2025 (FY 2025)

FY 2025 Sales by Package Size in the Northeast

Five-pound bags were easily the biggest seller in the Northeast, at $303 million. Due to deflation, five-pound bags declined in dollar sales but grew 0.7% in pounds. The same was true for 10-pound bags that saw dollar sales fall by 3.6% but volume increase by 3.9%. Several smaller sizes also experienced higher dollar growth rates.

Pack size	$ Sales	$ vs. YA	Volume sales	Pounds vs. YA
Fresh <2 lbs	$144M	+3.5%	58M	+4.6%
Fresh 2-5 lbs	$73M	+2.6%	49M	+7.9%
Fresh 5 lbs	$303M	-4.4%	394M	+0.7%
Fresh 8 lbs	$17M	-9.4%	28M	-1.1%
Fresh 10 lbs	$74M	-3.6%	125M	+3.9%
Fresh > 10 lbs	$0.9M	+38.2%	0.7M	+48.3%
Random weight	$88M	-13.0%	76M	+3.7%

Source: Circana, Integrated Fresh, MULO+, Northeast region, 52 w.e. 7/13/2025 (FY 2025)